

Case Plan

1. It is important to remember that when creating a Case Plan, a Family Assessment needs to be completed and approved first. The Case Plan will copy over the General Desired Outcomes (GDO's) from the Family Assessment.
2. From the desktop, go up to Create > Casework. Select Case Plan from the Planning Category. Select the case. Do not select a participant because the Case Plan relates to the entire family. Select Create. This will open the Case Plan Page.
3. The Case Plan Information box will pre-fill with the Case Name (if new plan, the name will not pre-fill until the Plan has been approved), Worker Name, Case Plan Status and Effective Date.
4. The Case Plan has two tabs, Outcomes Tab and Family Summary Tab. Let's address the Outcomes Tab first.

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eWISACWIS

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Case Plan Information

Case Name: Case Plan Status: Pending
Worker Name: Caitlin Cake Date Effective: 05/24/2004

Outcomes Family Summary

Case Participant/Family General Desired Outcomes

| Case Participant | General Desired Outcome | Outcome Deferred | Outcome Completed | |
|------------------|--|-------------------------------------|--------------------------|---|
| Family | Family manages household functions and financial resources and demonstrates effective coping and problem-solving skills. | <input type="checkbox"/> | <input type="checkbox"/> | Edit Delete |
| Family | Family support systems assist in meeting family needs and providing for the children's health, safety and welfare. | <input type="checkbox"/> | <input type="checkbox"/> | Edit Delete |
| Anna Ash | Parent provides age/dev. appr. guidance, limits and oversight to manage child's behavior & encourage appr. child behavior. | <input checked="" type="checkbox"/> | <input type="checkbox"/> | Edit Delete Copy Detail |
| Anna Ash | Parent acknowledges maltreatment, risk and safety concerns and accepts responsibility to protect. | <input type="checkbox"/> | <input type="checkbox"/> | Edit Delete Copy Detail |
| Anna Ash | Parent manages mental health and/or use of substances, regulates own behavior and manages emotions. | <input type="checkbox"/> | <input type="checkbox"/> | Edit Delete Copy Detail |

Insert

Options: [Go](#) [Save](#) [Close](#)

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5. The Case Participant Family General Desired Outcomes will pre-fill from the Family Assessment. The Case Participant, General Desired Outcomes, Outcome Deferred, and Outcome Completed are the areas that will copy over from the Family Assessment. The Case

Plan will allow a General Desired Outcome to be Deleted, Edited, and/or Copied over from one participant to another.

The Delete hyperlink will delete the entire GDO from the Case Plan.

The Outcome Deferred and Outcome Completed boxes will allow a check mark to be added or removed from the Ongoing Case Plan at anytime.

If the value of Case Plan is selected from the Options box at the bottom left side of the window and Go is selected, the printable version of the Case Plan will appear.

The Insert Button on the right side of the screen is used to add additional General Desired Outcomes for case participants. The Insert Button functions the same way as the Edit hyperlink, which will be discussed in the next paragraph.

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Case Plan Information

Case Name: Anna Ash Case Plan Status: Pending
Worker Name: Caitlin Cake Date Effective: 05/24/2004

Outcomes **Family Summary**

Case Participant/Family General Desired Outcomes

| Case Participant | General Desired Outcome | Outcome Deferred | Outcome Completed | |
|------------------|--|-------------------------------------|--------------------------|---|
| Family | Family manages household functions and financial resources and demonstrates effective coping and problem-solving skills. | <input type="checkbox"/> | <input type="checkbox"/> | Edit Delete |
| Family | Family support systems assist in meeting family needs and providing for the children's health, safety and welfare. | <input type="checkbox"/> | <input type="checkbox"/> | Edit Delete |
| Anna Ash | Parent provides age/dev. appr. guidance, limits and oversight to manage child's behavior & encourage appr. child behavior. | <input checked="" type="checkbox"/> | <input type="checkbox"/> | Edit Delete Copy Detail |
| Anna Ash | Parent acknowledges maltreatment, risk and safety concerns and accepts responsibility to protect. | <input type="checkbox"/> | <input type="checkbox"/> | Edit Delete Copy Detail |
| Anna Ash | Parent manages mental health and/or use of substances, regulates own behavior and manages emotions. | <input type="checkbox"/> | <input type="checkbox"/> | Edit Delete Copy Detail |

[Insert](#)

Options: [Go](#)

[Save](#) [Close](#)

Done [Local intranet](#)

Actions
Approval
Text
Case Plan

- The Edit hyperlink will allow information on the participant, GDO's to be updated and Goals to be entered.

7. The Plan Item box will be pre-filled if the Edit hyperlink is selected. If the Insert Button is selected, the Plan Item Box will be blank. The Case Participant, Domain, Element and GDO's are drop down values. These values may be changed at anytime to the Pending Case Plan. The General Desired Outcomes begin date will pre-fill with the date the Case Plan was created. The Estimated Completion date is a user- entered field and is not required.
8. The Specific Goals box documents the goals that the case-manager and family have agreed upon. The Specific Goal and How the Goal Achievement/Progress will be measured are user entered fields. The Delete hyperlink to the right of the Specific Goal will delete the Specific Goal.

The Specific Goal Begin Date and Specific Goal End Date are user entered fields.

If the Private Provider is known to eWiSACWIS use the Search hyperlink next to the Private Provider box to Search the Provider and have it pre-fill into the Case Plan. If the Provider is not known to the eWiSACWIS database, enter the name in the Other Provider box on the lower right side of the page.

The Service Box refers to the Service Category and Service Type. Click on the Search hyperlink next to the Service to Search out the Service Category and Service Type for the services to be offered and Provider. The frequency box refers to how often the Service will be utilized (for example: 2 times a week for one hour each session).

9. The Insert Button on the bottom right side of the page will allow additional Goals to be entered for the Same General Desired Outcome. By clicking Insert, a blank Specific Goal box will appear. Complete the Specific Goal Box with appropriate values. Pay attention to the scroll bar on the right of the page. This is an indication that there is more than one Specific Goals.
10. Make sure to click the Save and Close Buttons to save your Goals and to return to the Outcomes Tab.

Maintain Case Plan Item -- Web Page Dialog

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Plan Item

Case Participant: Family Domain: Domain IV: Family Functioning.

Element: Element 2: Family management and organization.

GDO: Family manages household functions and financial resources and demonstrates effective coping and problem-solving skills.

Other General Desired Outcome:

General Desired Outcome Begin Date: 05/24/2004 Estimated Completion Date: 00/00/0000

Specific Goals

Specific Goal: Enter Text Delete

How Goal Achievement/Progress will be Measured: Enter Text

Specific Goal Begin Date: 05/24/2004 Specific Goal End Date: 08/01/2004 Private Provider Selected

Private/Provider: Search Other Provider: Dr Smith

Service: Search Frequency: 1 time a week for one hour

Insert Save Close

Page 3 Sec 1 3/3 At 6" Ln 30 Col 1 REC TRK EXT OVR WPH

- The final item to discuss on the Outcomes Tab is the Copy Detail hyperlink. Copy Detail will copy the existing General Desired Outcome to another participant and will allow the GDO to be edited for the new participant.

By clicking on the Copy Detail hyperlink, a pop up message will appear. The message will display all case participants with a check box in front of the name. Check off the appropriate participant that should be included on the GDO that you want copied over. Click Save and Close.

Case Plan Copy -- Web Page Dialog

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Case Participants

| Name | DOB |
|--|------------|
| <input type="checkbox"/> Ash, Anna | 05/14/1968 |
| <input checked="" type="checkbox"/> Ash, April | 09/15/1993 |
| <input type="checkbox"/> Ash, Arthur | 08/13/1970 |
| <input type="checkbox"/> Ash, Ashley | 05/12/1992 |

Save Close

Pending

| | Outcome Deferred | Outcome Completed | |
|-----|--------------------------|--------------------------|--|
| and | <input type="checkbox"/> | <input type="checkbox"/> | Copy Detail |
| | <input type="checkbox"/> | <input type="checkbox"/> | Edit Delete Copy Detail |
| | <input type="checkbox"/> | <input type="checkbox"/> | Edit Delete Copy Detail |
| | <input type="checkbox"/> | <input type="checkbox"/> | Edit Delete Copy Detail |
| | <input type="checkbox"/> | <input type="checkbox"/> | Edit Delete Copy Detail |

Insert

Options: Go

Done

Page 4 Sec 1 4/4 At 7" Ln 10 Col 74 REC TRK EXT OVR WPH

12. The Copied over GDO will now appear under the Case Participants/Family General Desired Outcomes box attached to the new participant.
13. Click over to the Family Summary Tab. The Family Summary box contains three specific areas of the Case Plan that the case manager needs to address. Each field is a user- entered field that will allow a narrative.

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Case Plan Information

| | | | |
|--------------|--------------|-------------------|---------|
| Case Name: | Anna Ash | Case Plan Status: | Pending |
| Worker Name: | Caitlin Cake | Date Effective: | |

Outcomes **Family Summary**

Family Summary

| | |
|--|--|
| Worker/Provider Tasks/Responsibilities: | |
| Family Responsibilities: | |
| Comments including family involvement in, understanding of and response to the case plan: | |

Save **Close**

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- Once completed, go back to the Outcomes Tab, select Approval from the Options box and select Go to send the Case Plan for final Supervisory Approval.